

# KRONOS TRAINING

CT HR MANAGER & STAFF

# AGENDA

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**Getting Started**

- Signing in
- Understanding the Kronos Navigator
- Viewing your information

**Finding your team**

- Search for an employee report
- Working with hyperfinds
- Working with Genies

**Timecards**

- Editing punches
- Editing pay codes
- Adding comments
- Adding rows
- Transfers
- Scheduling a pattern
- Approving Timecards
- Audits

**Time-Off**

- Reviewing time off requests
- Time off reports

**Scheduling**

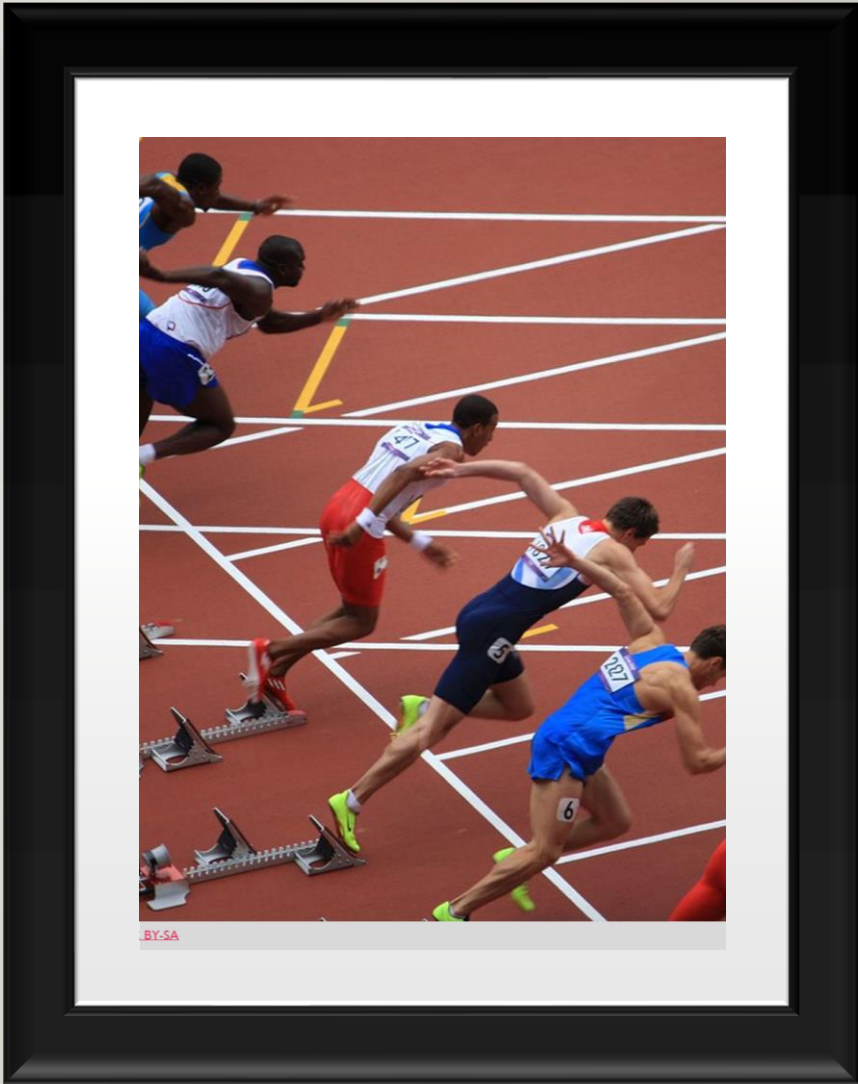
- Adding schedules
- Adding a pattern
- Assigning/Unassigning
- Editing a schedule
- Finding your team hyper find

**Leave**

- Viewing Leave Cases
- Leave Case Actions
- Additional Information
- Eligibility & Leave Types
- Frequency & Duration
- Notifications
- Employment status
- Leave Rules

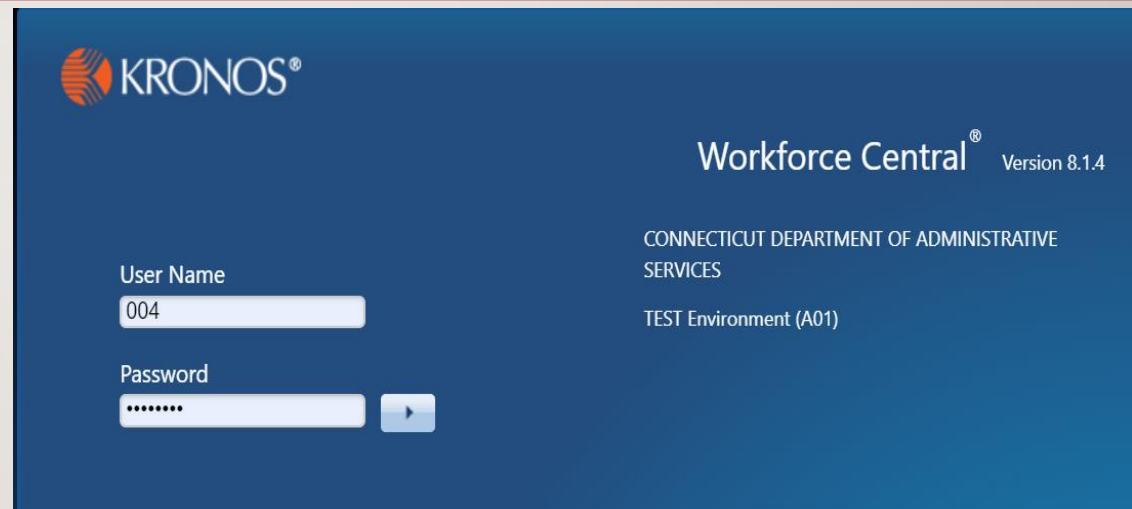
# GETTING STARTED

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# GETTING STARTED – SIGNING IN

- Now that you have successfully swiped let's log on to Kronos.
- Open a web browser and enter:
  - <https://ctgov-tst.kronos.net/wfc/logon>
- Enter your username and password



KRONOS®

Workforce Central® Version 8.1.4

CONNECTICUT DEPARTMENT OF ADMINISTRATIVE SERVICES

TEST Environment (A01)

User Name  
004

Password  
.....



# GETTING STARTED – UNDERSTANDING THE KRONOS NAVIGATOR

The screenshot shows the Kronos Navigator interface. At the top left is the Kronos logo. Below it is a navigation bar with 'My Information' and a '+2' indicator. A dropdown menu is open under the '+' sign, showing 'Manage My Department Interfaces'. The main section is titled 'My Timecard'. On the right, it says 'Loaded: 11:56 PM' and 'Current Pay Period'. Below this are buttons for 'View', 'Approve Timecard', 'Print Timecard', 'Refresh', 'Calculate Totals', and 'Save'. A circled '1' is placed over the 'View' button. A circled '2' is placed over the '+' sign in the navigation bar. Below the buttons is a table with the following columns: Date, Schedule, Pay Code, Amount, In, Transfer, Out, In, Transfer, Out, Shift, Daily, and Period. The table contains data for dates from Fri 1/03 to Sun 1/12.

	Date	Schedule	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Period
+ x	Fri 1/03	8:00AM-4:00...											
+ x	Sat 1/04												
+ x	Sun 1/05												
+ x	Mon 1/06	8:00AM-4:00...											
+ x	Tue 1/07	8:00AM-4:00...											
+ x	Wed 1/08	8:00AM-4:00...											
+ x	Thu 1/09	8:00AM-4:00...											
+ x	Fri 1/10	8:00AM-4:00...											
+ x	Sat 1/11												
+ x	Sun 1/12												

1. Employee timecard:  
Can add your own punches, add specific pay codes, and also approve your timecard
2. Clicking the ' + ' sign will bring you a list of the different modules you can access, as a timekeeper you can manage your department and export time reports

# GETTING STARTED – UNDERSTANDING THE KRONOS NAVIGATOR

The screenshot displays the Kronos Navigator interface. At the top left is the Kronos logo. Below it, there are navigation tabs: 'My Information' (selected) and 'My Timecard'. A dropdown menu for 'My Timecard' shows 'Manage My Department Interfaces'. On the right side of the header, there is a 'Current Pay Period' dropdown menu and a 'Loaded: 11:56 PM' indicator. Below the header, there are several icons: 'View', 'Approve Timecard', 'Print Timecard', 'Refresh', 'Calculate Totals', and 'Save'. A circled '1' is placed over the 'Current Pay Period' dropdown, and a circled '2' is placed over the 'Print Timecard', 'Refresh', 'Calculate Totals', and 'Save' buttons. The main area is a table with columns for Date, Schedule, Pay Code, Amount, In, Transfer, Out, In, Transfer, Out, Shift, Daily, and Period. The table contains data for dates from Fri 1/03 to Sun 1/12, with a schedule of 8:00AM-4:00... for most days.

	Date	Schedule	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Period
+ x	Fri 1/03	8:00AM-4:00...											
+ x	Sat 1/04												
+ x	Sun 1/05												
+ x	Mon 1/06	8:00AM-4:00...											
+ x	Tue 1/07	8:00AM-4:00...											
+ x	Wed 1/08	8:00AM-4:00...											
+ x	Thu 1/09	8:00AM-4:00...											
+ x	Fri 1/10	8:00AM-4:00...											
+ x	Sat 1/11												
+ x	Sun 1/12												

1. Can use the drop down and the calendar icon to change the time period view
2. The buttons allow you to refresh, save, and print out your timecard information

# GETTING STARTED – UNDERSTANDING THE KRONOS NAVIGATOR

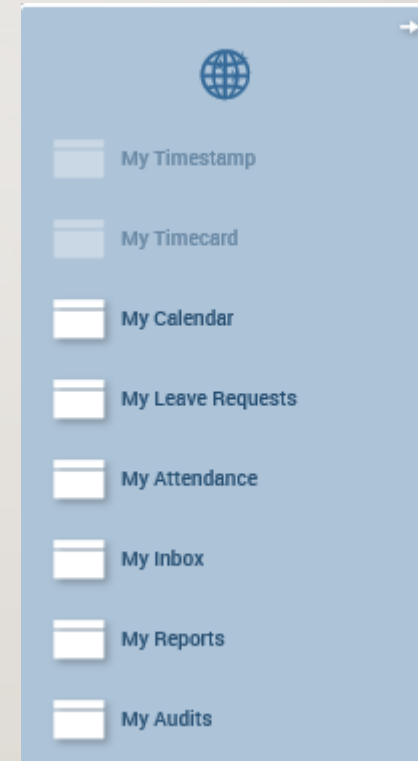
1. User information and log off
2. Last timestamp and transfer allows you to execute a transfer and record a punch
3. Related Items menu: Through related items you can access all the different widgets that interface has to offer, as you cycle through my information, manage my department, etc the related items menu will update
4. Search: Can provide help with any look up you're having trouble with

The image displays two screenshots from the Kronos Navigator interface. The main screenshot on the left shows the 'My Timestamp' widget with a 'Last Timestamp' field (circled 2), a 'Transfer' dropdown menu, a 'Cancel Deductions' checkbox, and a 'Record Timestamp' button. A search icon (circled 4) is in the top right. A sidebar menu (circled 3) lists various widgets: My Timestamp, My Timecard, My Calendar, My Leave Requests, My Attendance, My Inbox, My Reports, and My Audits. The top navigation bar (circled 1) includes 'Timekeeper Persona', 'Sign Out', and a search icon. The inset screenshot on the right shows the 'Transfer' dialog box (circled 2) with fields for Job, Labor Account, Work Rule, Agency-Dept, Location, Combo Code, Override Reas, Employee ID-E, Supervisor, and Job, along with 'Cancel' and 'Apply' buttons.

# GETTING STARTED – VIEWING YOUR INFORMATION

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Through the related items menu on the right side of the screen you can access all your information





# GETTING STARTED – VIEWING YOUR INFORMATION

Through the My Calendar widget you can view your calendar and see your daily schedule as well as make requests for time off

The screenshot shows the 'My Calendar' interface. At the top, there's a header with the title 'My Calendar' and a navigation bar for 'January 5 - 11, 2020'. Below the header are five icons: 'Day', 'Week' (selected), 'Month', 'Visibility Filter', and 'Request Time Off'. The main area is a calendar grid. The columns represent days: 'Sun 1/05', 'Mon 1/06', and 'Tue 1/07'. The rows represent time slots from 8:00 AM to 3:00 PM. On Monday and Tuesday, there are blue blocks representing a regular work schedule from 8:00 AM to 4:00 PM, labeled '[8.00 h] Regular'. A horizontal orange line is visible at the 1:00 PM mark on Sunday.

	Sun 1/05	Mon 1/06	Tue 1/07
8:00AM		8:00AM-4:00PM [8.00 h] Regular	8:00AM-4:00PM [8.00 h] Regular
9:00AM			
10:00AM			
11:00AM			
12:00PM			
1:00PM			
2:00PM			
3:00PM			

# GETTING STARTED – VIEWING YOUR INFORMATION

Through the Request Time Off button in the My Calendar widget you can fill in start date, end date, pay code, and time unit.

You can also view your accrual bucket balances at the bottom of the screen in order to choose which pay code to use for your request, click **Submit** at the bottom when completed.

### Request Time Off

Type:

	Start date	End date	Pay code	Time Unit	Start time	Daily Amount
<input type="button" value="+"/>	1/07/2020	1/07/2020	Vacation	Full day		

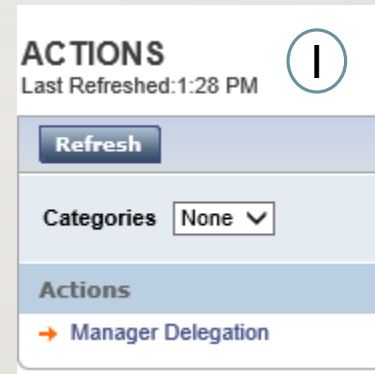
Accruals on:

Accrual	Balance
Bone Marrow Donor	56.0 Hour
Comp Time	0.0 Hour
Comp Time Holiday	0.0 Hour

# GETTING STARTED – VIEWING YOUR INFORMATION

Through the My Attendance widget you can see the actions available you

1. The only available action for timekeeper is Manager Delegation
2. After having clicked manager delegation, you choose the delegate, the timeframe, and the role you would like to delegate and then **Save & Close**



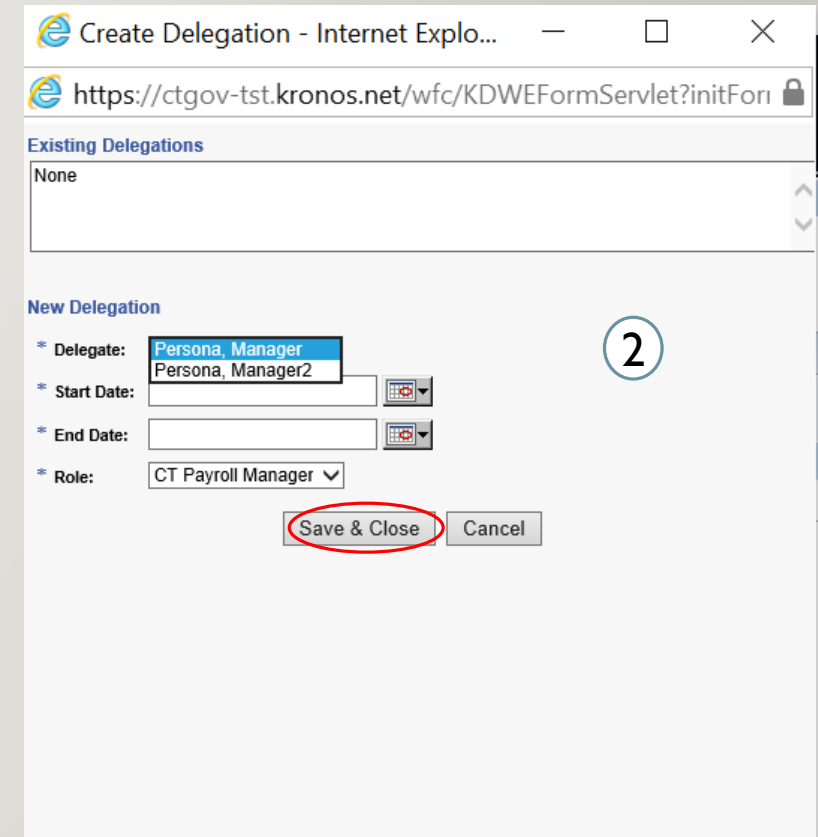
**ACTIONS** ⓘ  
Last Refreshed: 1:28 PM

**Refresh**

Categories: None ▾

**Actions**

→ **Manager Delegation**



Create Delegation - Internet Explo...  
https://ctgov-tst.kronos.net/wfc/KDWEFormServlet?initFor...

**Existing Delegations**

None

**New Delegation** ②

\* Delegate: Persona, Manager  
Persona, Manager2

\* Start Date: [ ] [ ]

\* End Date: [ ] [ ]

\* Role: CT Payroll Manager ▾

**Save & Close** Cancel

# GETTING STARTED – VIEWING YOUR INFORMATION

- Through the My Inbox widget you can see all your tasks and messages
- Tasks are things you need to do or have started but not completed, in this case a manager delegation form I began on the previous slide and did not complete
- Messages can be notifications from supervisors or updates about timecards/requests

The screenshot displays the 'My Inbox' interface. At the top, it says 'INBOX' and 'Last Refreshed: 1:35 PM'. Below this are two tabs: 'TASKS' (selected) and 'MESSAGES'. There are three buttons: 'Edit', 'Reassign', and 'Refresh'. Below the buttons are filters: 'Status' set to 'Active', 'As of Date' set to '12/08/2019', and 'Categories' set to 'All'. A table below shows one entry with 'From: Persona, Timekeeper' and 'Subject: Manager Delegation, Request Form'.

From	Subject
Persona, Timekeeper	Manager Delegation, Request Form



# GETTING STARTED – VIEWING YOUR INFORMATION

1. In the My Reports widget Schedule and Time Detail can be viewed by selecting the report and the Time Period and click **View Report**
2. To view My Accrual Balances and Projections select the report and fill in the As Of date then click **View Report**

My Reports

REPORTS Name: Persona, Timekeeper

**View Report** Primary Account

AVAILABLE REPORTS

Schedule Time Detail

Time Period Current Pay Period

Schedule Description Displays an employe

My Accrual Balances and Projections

Screenshot 1 shows the 'My Reports' widget. The 'View Report' button is circled in red. The 'Time Period' dropdown is set to 'Current Pay Period'. The 'Schedule' report is selected.

My Reports

REPORTS Name: Persona, Timekeeper

**View Report** Primary Account

AVAILABLE REPORTS

Schedule Time Detail

Time Period Specific Date

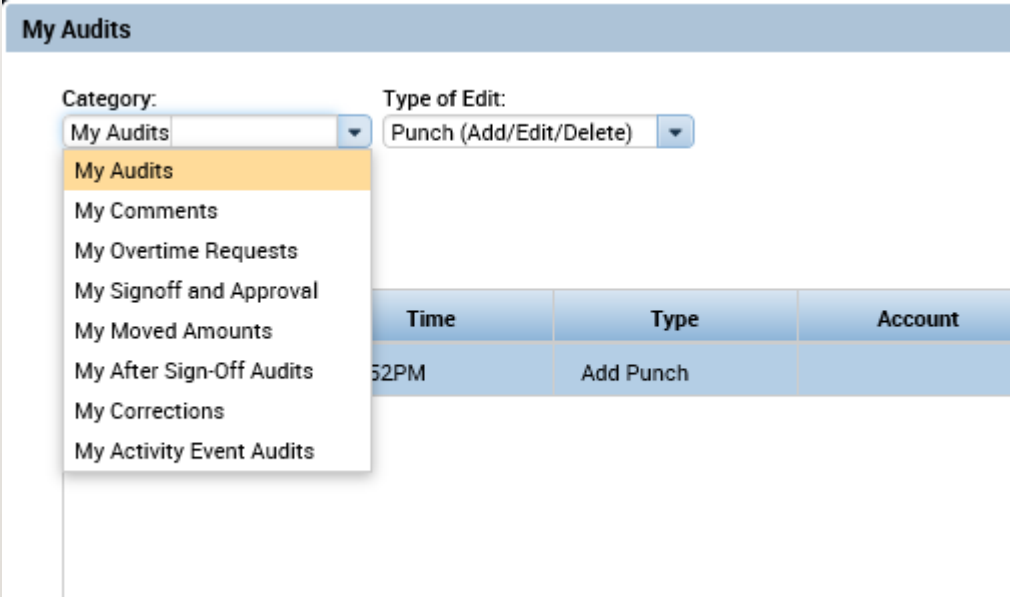
My Accrual Ba Description Displays an em

My Accrual Balances and Projections As Of

Screenshot 2 shows the 'My Reports' widget. The 'View Report' button is highlighted. The 'Time Period' dropdown is set to 'Specific Date'. The 'My Accrual Balances and Projections' report is selected, and the 'As Of' date field is visible.

# GETTING STARTED – VIEWING YOUR INFORMATION

Through the My Audits widget you can view different actions such as punching in as shown on the right, or all the categories listed on the drop down



The screenshot displays the 'My Audits' widget interface. At the top, there is a header 'My Audits'. Below the header, there are two dropdown menus: 'Category:' and 'Type of Edit:'. The 'Category:' dropdown is currently set to 'My Audits' and is open, showing a list of categories: 'My Audits', 'My Comments', 'My Overtime Requests', 'My Signoff and Approval', 'My Moved Amounts', 'My After Sign-Off Audits', 'My Corrections', and 'My Activity Event Audits'. The 'Type of Edit:' dropdown is set to 'Punch (Add/Edit/Delete)'. Below the dropdowns, there is a table with three columns: 'Time', 'Type', and 'Account'. The table contains one row of data: '52PM', 'Add Punch', and an empty cell.

Time	Type	Account
52PM	Add Punch	

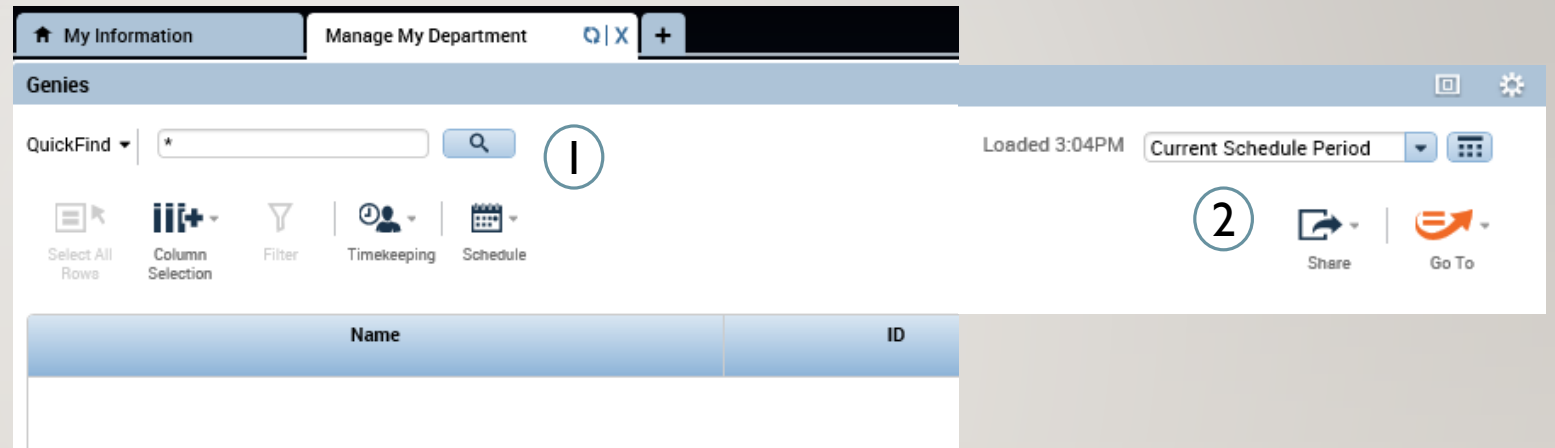
# FINDING YOUR TEAM

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# FINDING YOUR TEAM – SEARCHING FOR AN EMPLOYEE REPORT

1. Under the Manage My Department interface use the default QuickFind Genie and search for your employee. Type in the name of your employee or begin the search with '\*' to search employees with their named ending in the following letters, end your search with '\*' to find employees whose names start with the entered letters. Searching '\*' will return every employee
2. This area allows you to change the desired timeframe, or share the employee information by exporting it to excel or csv. Go To allows you to select an employee and transition to the different Management widgets that will covered

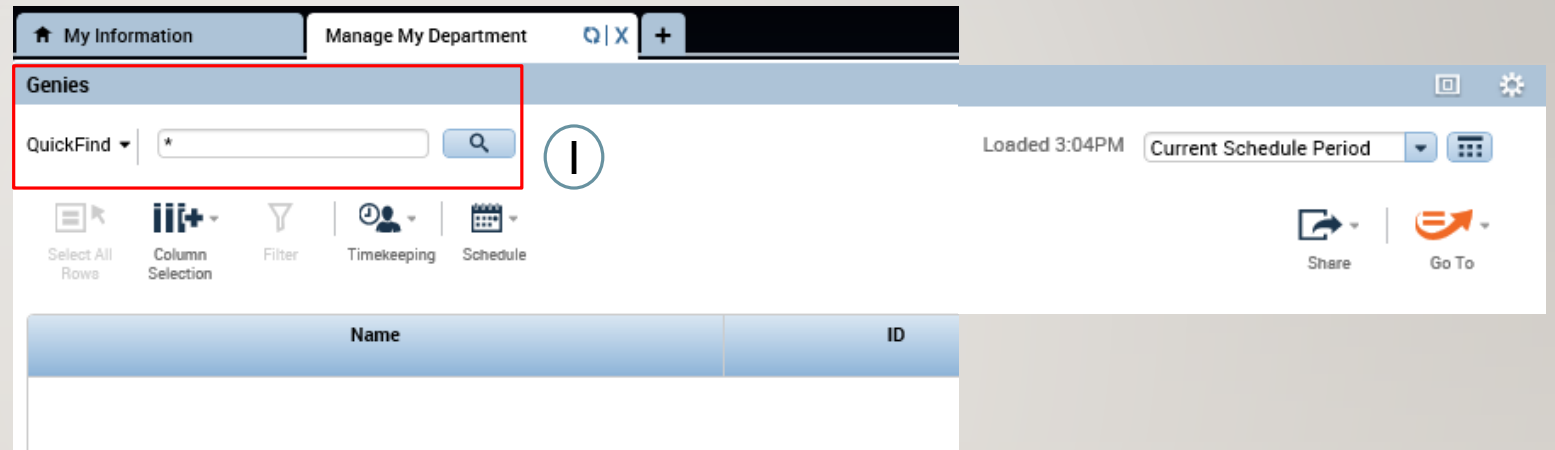


The screenshot shows the 'Manage My Department' interface. At the top, there are navigation tabs for 'My Information' and 'Manage My Department'. Below this is the 'Genies' search tool. It features a 'QuickFind' search bar with an asterisk (\*) entered. To the right of the search bar is a search icon and a status indicator 'Loaded 3:04PM'. Below the search bar are several management icons: 'Select All Rows', 'Column Selection', 'Filter', 'Timekeeping', and 'Schedule'. On the right side of the interface, there are 'Share' and 'Go To' buttons. Below the search bar is a table with two columns: 'Name' and 'ID'.

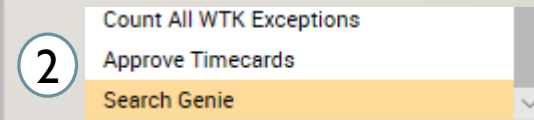
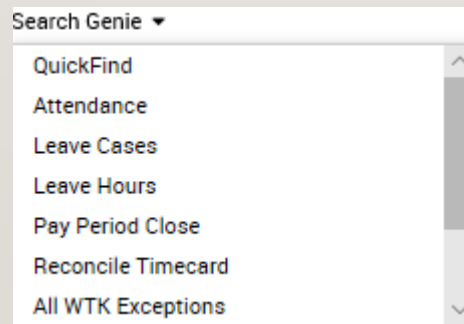


# FINDING YOUR TEAM – WORKING WITH GENIES

1. Under the Manage My Department interface use the default QuickFind Genie and search for your employee. Type in the name of your employee or begin the search with '\*' to search employees with their named ending in the following letters, end your search with '\*' to find employees whose names start with the entered letters. Searching '\*' will return every employee



2. This area allows you to change the desired timeframe, or share the employee information by exporting it to excel or csv. Go To allows you to select an employee and transition to the different Management widgets that will covered



# FINDING YOUR TEAM – WORKING WITH GENIES

1. Leave hours shows you the details of all paid and unpaid committed and uncommitted hours
2. Leave cases gives you a broader view of all the leave cases and dates, including documents required and frequency

Genies

Leave Hours ▾

Select All Rows | Column Selection | Filter | People | Timekeeping | Approval | Schedule | Absence

1

Name	Leave Case Status	Leave Case Code	Leave St... Date	Leave E... Date	Committed Paid Leave Time	Committed Unpaid Leave Time	Last Date/ Committed Paid Leave Time	Last Date/ Committed Unpaid Leave Time	Total Paid Le... Takings	Total Unpaid Leave Takings
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Genies

Leave Cases ▾

Select All Rows | Column Selection | Filter | People | Timekeeping | Approval | Schedule | Absence

2

Name	Leave Case Status	Leave Category	Leave Rea...	Leave Case Code	Leave Frequen...	Leave Case Approval Stat...	Initial Leave Request Date	Leave S... Date	Docume... Overdue	New Lea. Request	Leave End Date
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# FINDING YOUR TEAM - HYPERFIND

1. Under the locations drop down as shown below, there will be a list of hyperfinds, select the New button to create a new Hyperfind.
2. Select whether you want the Hyperfind to be public or private or ad hoc which is one that is available to everyone that can only be edited
3. Choose by what criteria you want to narrow down your employees whether it be timekeeper, attendance, etc and open their dropdown.
4. Choose whether you want your Hyperfind to include or exclude employees then fill in the dates and the specifics of what you want to search with, tap **Save As** to complete the hyper find creation.

The screenshot displays the 'HYPERFIND QUERIES' interface. On the left, a sidebar shows a navigation menu with 'Hyperfinds (13)' expanded, listing various filters like 'All Home' and 'LV-Closed Cases'. A callout '1' points to the 'New...' option. The main panel has a 'Visibility' dropdown set to 'Public' (callout '2'), a 'Filter' section with 'Name or ID' selected (callout '3'), and a search area with 'Include' selected and 'By Last Name' chosen (callout '4'). At the bottom right, the 'Save As' button is highlighted with a red box.

# FINDING YOUR TEAM – EXERCISE I

PLEASE REFER TO THE HR  
EXERCISE GUIDE IN  
ORDER TO PRACTICE  
THE PREVIOUS  
CONCEPT



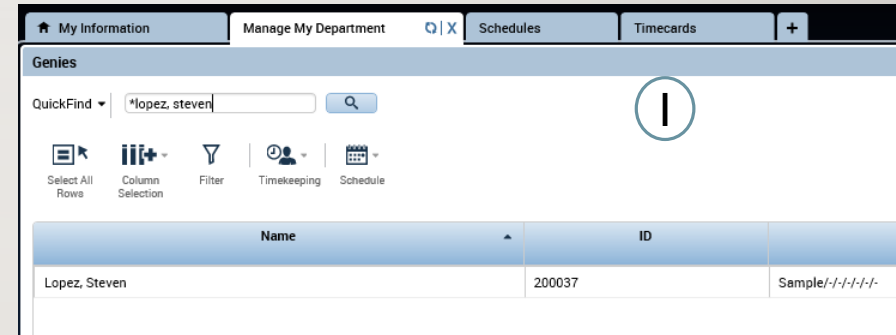
# TIMECARDS

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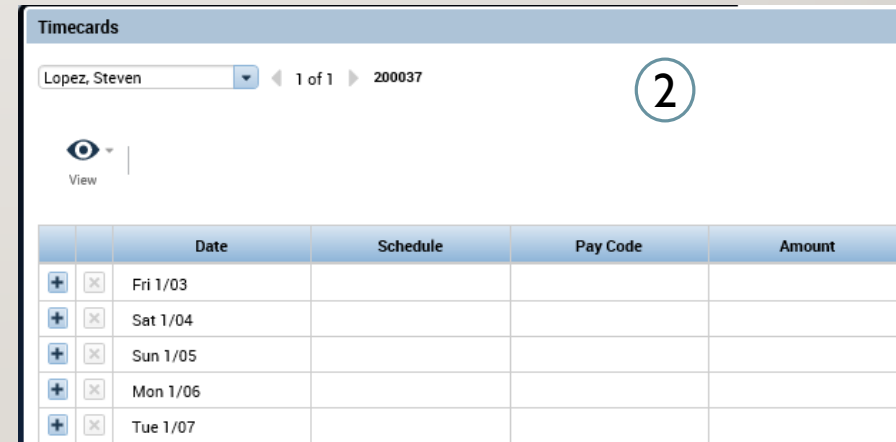
# TIMECARDS – EDITING PUNCHES

1. Using the QuickFind Genie under Manage My Department search for the employee you want to see, then double click their name to open their timecard
2. Once in the timecard you can adjust the view change the timeframe and begin editing



The screenshot shows the 'Genies' search interface. At the top, there are navigation tabs: 'My Information', 'Manage My Department', 'Schedules', and 'Timecards'. Below the tabs, the 'Genies' section has a 'QuickFind' dropdown menu with the search term '\*lopez, steven' entered. A search icon is to the right of the input field. Below the search bar are several icons: 'Select All Rows', 'Column Selection', 'Filter', 'Timekeeping', and 'Schedule'. A table below the icons has columns for 'Name', 'ID', and a schedule pattern. The first row contains the data: 'Lopez, Steven', '200037', and 'Sample-/+/+/+/+/+'. A circled '1' is placed over the search bar area.

Name	ID	
Lopez, Steven	200037	Sample-/+/+/+/+/+



The screenshot shows the 'Timecards' editing interface. At the top, there is a dropdown menu with 'Lopez, Steven' selected. To the right of the dropdown are navigation arrows and the ID '200037'. Below this is a 'View' icon. The main part of the interface is a table with columns for 'Date', 'Schedule', 'Pay Code', and 'Amount'. The table has five rows of data, each with a '+' icon in the first column and an 'X' icon in the second column. The dates are: 'Fri 1/03', 'Sat 1/04', 'Sun 1/05', 'Mon 1/06', and 'Tue 1/07'. A circled '2' is placed over the dropdown menu area.

		Date	Schedule	Pay Code	Amount
+	X	Fri 1/03			
+	X	Sat 1/04			
+	X	Sun 1/05			
+	X	Mon 1/06			
+	X	Tue 1/07			

# TIMECARDS – EDITING PUNCHES

1. Once in the timecard, exceptions will be highlighted such as a missed in/out punch as shown on the right
2. Select the desired cell and enter the corrected time, hover over any exception to get an explanation of what the exception is

The screenshot shows a web application interface for 'Timecards'. At the top, there is a header with the name 'Lopez, Steven', a dropdown menu, and navigation icons. Below the header is a table with the following columns: Date, Schedule, Pay Code, Amount, In, Transfer, and Out. The table contains four rows of data for the dates Fri 1/03, Sat 1/04, Sun 1/05, and Mon 1/06. The 'In' column for Fri 1/03 and Mon 1/06 shows '8:00AM'. The 'Out' column for Fri 1/03 is highlighted in red, indicating an exception. The 'Out' column for Mon 1/06 shows '12:00PM'. There are also small icons (plus and minus) in the first two columns of each row.

		Date	Schedule	Pay Code	Amount	In	Transfer	Out
+	x	Fri 1/03				8:00AM		
+	x	Sat 1/04						
+	x	Sun 1/05						
+	x	Mon 1/06				8:00AM		12:00PM

# TIMECARDS – ADDING COMMENTS

1. By default entered time will follow the Pay Rule that has been assigned to you and you will not need to enter pay codes for regular time/OT/ or Holidays
2. Once you select **Comments** choose Explanation from the drop down and then add the desired comment

The image shows two screenshots from a timecard system. The top screenshot is a 'Punch Actions' dialog box. It displays details for a punch-in on 1/03/2020 at 8:00AM. The punch is categorized as 'In Punch' and is 'Unscheduled'. The 'Comments' icon at the bottom is circled in red. The bottom screenshot is the 'Comment' form, which has a dropdown menu set to 'Explanation' and a text input field. The 'Add' button is highlighted, and the 'Comments (1)' header is circled in blue.

**Punch Actions**

Date: 1/03/2020  
Time: 8:00AM  
Rounded Time: 1/03/2020 8:00AM GMT-05:00  
Override: In Punch  
Time Zone: (GMT-05:00) Eastern Time (USA; Canada)  
Exceptions: Unscheduled  
Last Edit Date: 1/08/2020  
Edit Made By: Persona, Timekeeper

Mark As Reviewed Edit **Comments** Justify Exception

**Comment**

Comments (1) Add Comment

Explanation

Add another note Add

Cancel OK



# TIMECARD — EXERCISE 2






PLEASE REFER TO THE HR  
EXERCISE GUIDE IN  
ORDER TO PRACTICE  
THE PREVIOUS  
CONCEPT

# TIMECARDS – EDITING PAY CODES

1. By default entered time will follow the Pay Rule that has been assigned to you and you will not need to enter pay codes for regular time/OT/ or Holidays
  
2. Pay codes will need to be entered for exceptional situations such as the employee being unable to submit a leave/time off request. In the example on the right there was a delayed entry so you would enter the employee timecards and set the delayed time by entering the Amount and selecting Governor Granted Time Off

Genies

QuickFind ▾ \*Lopez, steven 🔍

 Select All Rows
  Column Selection
  Filter
  Timekeeping
  Schedule
 1

Name	ID ▲	Primary Labor Account	Pay Rule
Lopez, Steven	200037	Sample/-/-/-/-/-	02 FT NSD STD 8

		Date	Schedule	Pay Code	Amount
+/-	X	Fri 1/03			
+/-	X	Sat 1/04		2	
+/-	X	Sun 1/05			
+/-	X	Mon 1/06			
+/-	X	Tue 1/07		Governor Granted Ti...	2.0

# TIMECARDS – ADDING ROWS

1. Click on the ‘+’ to add a new row to a day. This can be done if an employee took a couple hours off or if there’s a delayed entry. Pay codes and regular scheduled hours need to be entered on different rows.

①

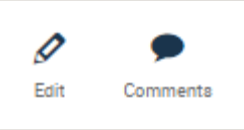
+	x	Tue 1/07		Governor Granted Ti...	2.0
+	x				

2. Once you enter the pay code for the time off and the regular hours worked the time will be automatically compiled on the right, you can see the sum of hours under the Daily column.

②

Shift	Daily
8.5	8.5
6.0	8.0

# TIMECARDS – OVERRIDES AND CANCELLATIONS



- 1. Right clicking on a punch and selecting Edit, allows you to set an override, such as setting a new shift or adding a break
- 2. You can also cancel deductions, in scenarios where employees did not take a lunch because they had to continue working as shown here

**Punch**

Date: 9/02/2020

Time (h:mma) \*: 5:00PM

Rounded Time: 9/02/2020 5:00PM GMT-04:00

Override:

Time Zone:

Cancel Deduction:

Exceptions:

Comments:

**Punch**

Date: 9/02/2020

Time (h:mma) \*: 5:00PM

Rounded Time: 9/02/2020 5:00PM GMT-04:00

Override:

Time Zone:

Cancel Deduction:

Exceptions:

Comments:



# TIMECARDS – LUNCH EDITS FOR TIME OFF

1. When an employee takes time off during the day they may not receive their automatic meal deduction due to the 6 hour shift length minimum for a lunch deduction
2. In this scenario you would make adjustments to the second set of punches to account for the taken lunch

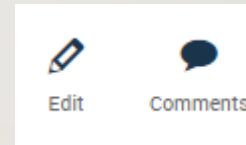
8:00AM-9:00AM			8:00AM		9:00AM				1.0	
	Sick Appointments	2.5	9:00AM							
11:30AM-5:00PM			11:30AM		5:00PM				5.5	9.0

8:00AM-9:00AM			8:00AM		9:00AM					
	Sick Appointments	2.5	9:00AM							
11:30AM-5:00PM			11:30AM		12:00...	1:00PM		5:00...		

# TIMECARDS – LUNCH EDITS FOR TIME OFF

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1. Right click on the punch you edited and select the Edit button
2. Select Explanation from the drop down and enter the reason for the manual adjustment



**Comment**

**Comments (1)** [Add Comment](#)

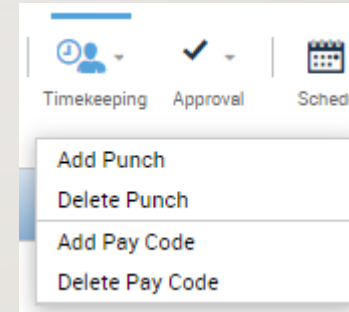
[Add another note](#)

# TIMECARD — EXERCISE 3 & 4

PLEASE REFER TO THE HR  
EXERCISE GUIDE IN  
ORDER TO PRACTICE  
THE PREVIOUS  
CONCEPT

# TIMECARDS – GROUP EDITS

1. You also have options to add a punch or a pay code to a group of people
2. All you would need to do is select the employees you want to modify and choose then add in the punch or pay code. This can be useful in the LWGOV scenario to avoid having to manually add in every pay code



1

A screenshot of a software interface showing a table of employee data. The table has columns for Name and ID. The table contains four rows of data: Bell, Morgan T (ID: 463595), Maldonado, Vanessa (ID: 481192), Munoz-Velazquez, Angel M (ID: 469835), and Persona, Employee (ID: 003). Above the table, there is a search bar labeled 'QuickFind' and a toolbar with icons for 'Select All Rows', 'Column Selection', 'Filter', 'Timekeeping', 'Approval', and 'Schedule'.

Name	ID
Bell, Morgan T	463595
Maldonado, Vanessa	481192
Munoz-Velazquez, Angel M	469835
Persona, Employee	003

2

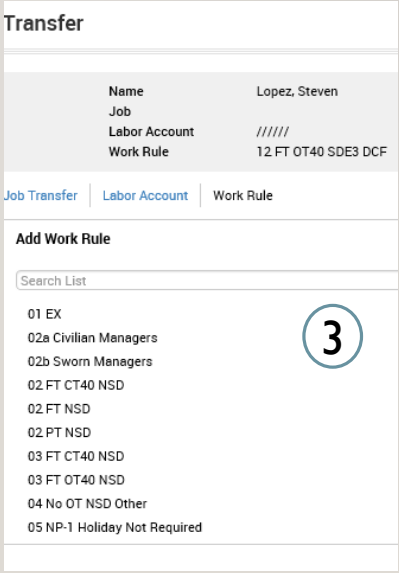
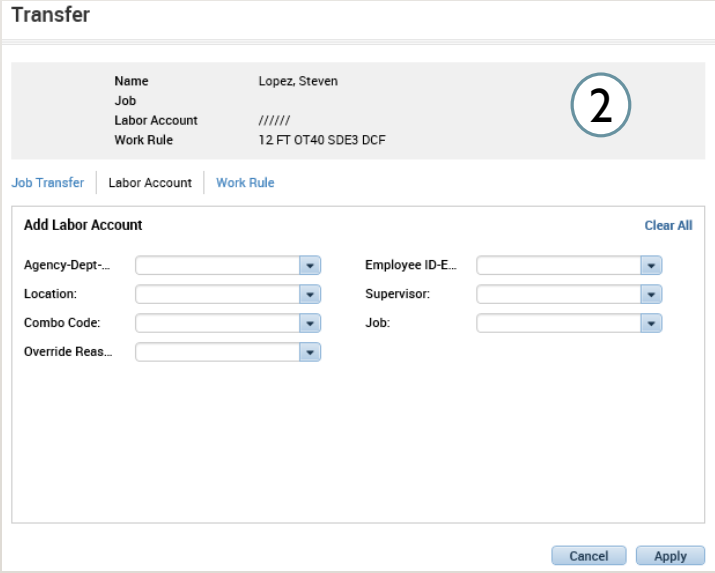
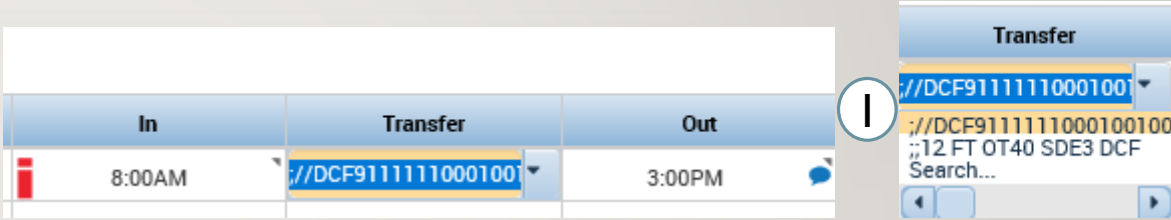


# TIMECARD — EXERCISE 5 & 6

PLEASE REFER TO THE HR  
EXERCISE GUIDE IN  
ORDER TO PRACTICE  
THE PREVIOUS  
CONCEPT

# TIMECARDS – TRANSFERS

1. On the timecard between the in and out punches you can choose the transfer drop down, from there you can choose previously chosen work rules/labor accounts or search for an unused one
2. Labor Account Transfer: this can be done if you are working at a different location for a day or working a different position you want to charge to that different location
3. Work rule transfer: You get called in and there's a different pay rule for being called in, you would do a work rule transfer and enter the pay rule that should be applied to you for that day  
 Ex: Nurses being called in for an hour and a half with the pay rule of being paid a minimum of four hours for call ins.



# TIMECARD — EXERCISE 7

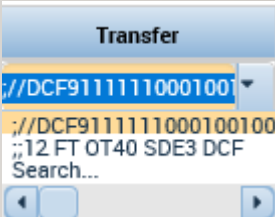
PLEASE REFER TO THE HR  
EXERCISE GUIDE IN  
ORDER TO PRACTICE  
THE PREVIOUS  
CONCEPT

# TIMECARDS – LABOR ACCOUNT TRANSFERS

- 1. On the timecard between the in and out punches you can choose the transfer drop down, from there you can choose previously chosen work rules/labor accounts or search for an unused one
- 2. Labor Account Transfer: this can be done if you are working at a different location for a day or working a different position you want to charge to that different location



1



Transfer

Name	Lopez, Steven
Job	
Labor Account	/////
Work Rule	12 FT OT40 SDE3 DCF

2

Job Transfer | Labor Account | Work Rule

Add Labor Account Clear All

Agency-Dept...	<input type="text"/>	Employee ID-E...	<input type="text"/>
Location:	<input type="text"/>	Supervisor:	<input type="text"/>
Combo Code:	<input type="text"/>	Job:	<input type="text"/>
Override Reas...	<input type="text"/>		

Cancel Apply



# TIMECARD — EXERCISE 8

PLEASE REFER TO THE HR  
EXERCISE GUIDE IN  
ORDER TO PRACTICE  
THE PREVIOUS  
CONCEPT

# TIMECARDS –WORK RULE TRANSFERS

Work rule transfer: You get called in and there's a different pay rule for being called in, you would do a work rule transfer and enter the pay rule that should be applied to you for that day

**Transfer**

---

Name	Lopez, Steven
Job	
Labor Account	/////
Work Rule	12 FT OT40 SDE3 DCF

[Job Transfer](#) | [Labor Account](#) | [Work Rule](#)

---

**Add Work Rule**

Search List

- 01 EX
- 02a Civilian Managers
- 02b Sworn Managers
- 02 FT CT40 NSD
- 02 FT NSD
- 02 PT NSD
- 03 FT CT40 NSD
- 03 FT OT40 NSD
- 04 No OT NSD Other
- 05 NP-1 Holiday Not Required

# TIMECARD — EXERCISE 9

PLEASE REFER TO THE HR  
EXERCISE GUIDE IN  
ORDER TO PRACTICE  
THE PREVIOUS  
CONCEPT

# TIMECARDS – APPROVALS

- 1. On the desired employees Timecard select Approve Timecard and then select Approve Timecard from the dropdown
- 2. Once the Timecard is approved, every cell will turn yellow, become un-editable, and a banner will show up with information on your approval, you can also Remove Timecard Approval using the same button and the cells will turn white again

The screenshot displays the 'Timecards' interface. At the top, there is a dropdown menu for 'Persona, Employee' and a page indicator '1 of 1' with '003' next to it. Below this is a 'View' button and a dropdown menu. The dropdown menu is open, showing 'Approve Timecard' (highlighted with a red box) and 'Remove Timecard Approval'. A tooltip also shows these two options. Below the dropdown is a table with columns for Date, Schedule, Pay Code, and Amount. The table contains four rows of data for dates Fri 1/03, Sat 1/04, Sun 1/05, and Mon 1/06. The bottom part of the screenshot shows an 'Information' banner stating 'Timecard Approved by 002 1/09/2020 3:44PM'. Below the banner, the 'View' button and dropdown menu are shown again, with the dropdown menu now showing 'Approve Timecard'. The table below has all cells highlighted in yellow.

		Date	Schedule	Pay Code	Amount
+	x	Fri 1/03	8:00AM-4:00PM		
+	x	Sat 1/04			
+	x	Sun 1/05			
+	x	Mon 1/06	8:00AM-4:00PM		

1

2



# TIMECARDS – AUDITS

1

1. On the desired employees Timecard select Approve Timecard and then select Approve Timecard from the dropdown
2. Once the Timecard is approved, every cell will turn yellow, become un-editable, and a banner will show up with information on your approval, you can also Remove Timecard Approval using the same button and the cells will turn white again

Audits

Category: Audits Type of Edit: All

Lopez, Steven 1 of 1 200037

Date	Time	Type	Account	Pay Code	Amount	Work Rule	Override	Include in Totals	Effective Date	Comment
1/03/2020	8:00AM	Add Punch					In Punch			
1/06/2020	12:00PM	Add Punch					Out Punch			

Category: Audits

- Comments
- Overtime Requests
- Signoff and Approval
- Moved Amounts
- After Sign-Off Audits
- Corrections
- Activity Event Audits
- Day Lock Audits
- Schedule Audits

Type of Edit: All

- Hours Worked (Add/Edit/...
- Duration (Add/Edit/Delete)
- Approvals/Sign-offs
- Justification (Add/Edit/D...
- All Retroactive (Add/Edit...
- Retroactive Punch (Add/...
- Retroactive Pay Code (A...
- Account Approval Detail
- Historical Correction (Ad...

2



**15 MINUTE BREAK**

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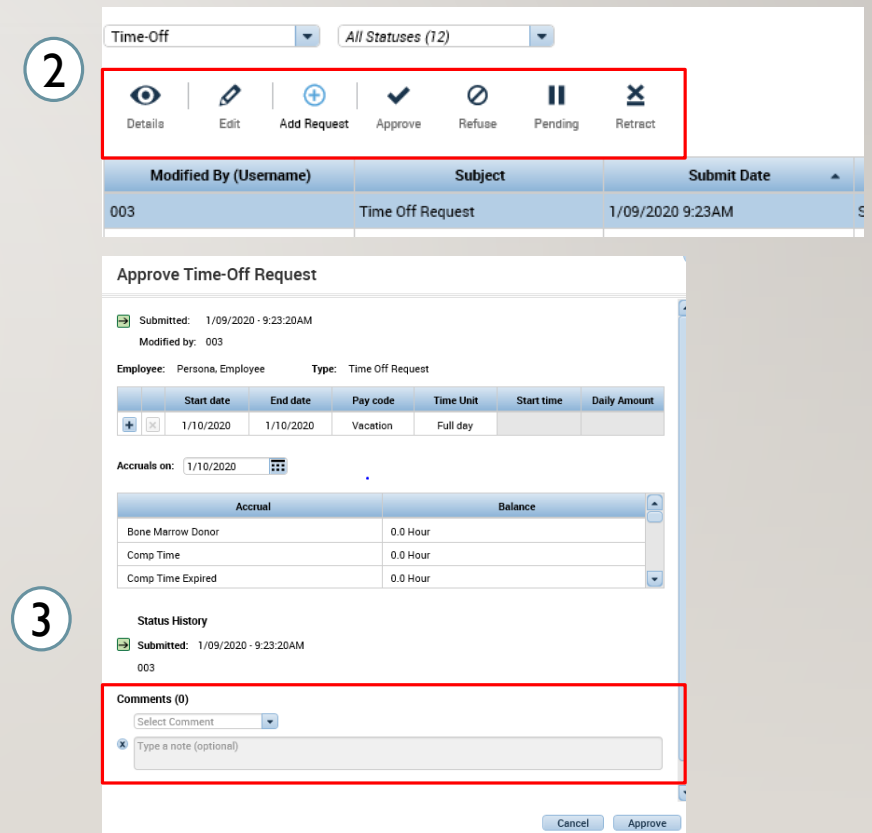
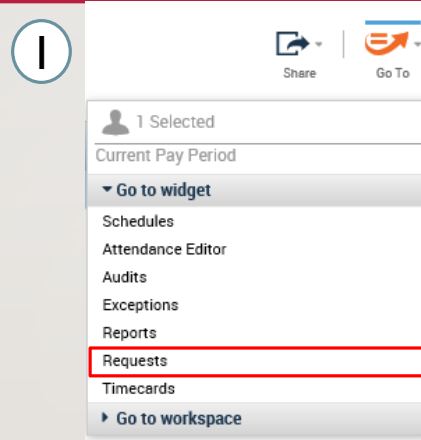
# TIME OFF

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# TIME OFF – REVIEWING TIME OFF REQUESTS

1. After finding the desired employee using the QuickFind, use the Go To button and select **Requests**
2. The following menu will appear with the options to **view, edit, approve, refuse, set as pending, and retract.**
3. Whichever item you choose will lead you to the following menu, where you can decide what to do with the request and then **add an optional comment** to explain the decision.

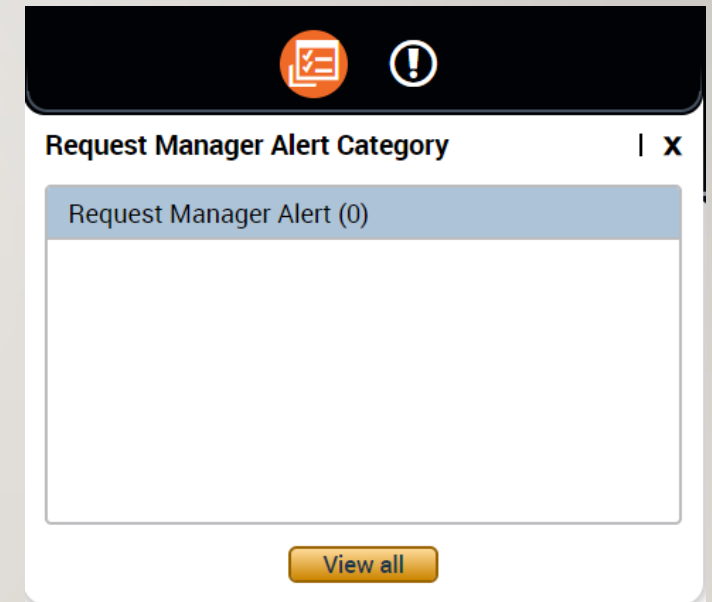
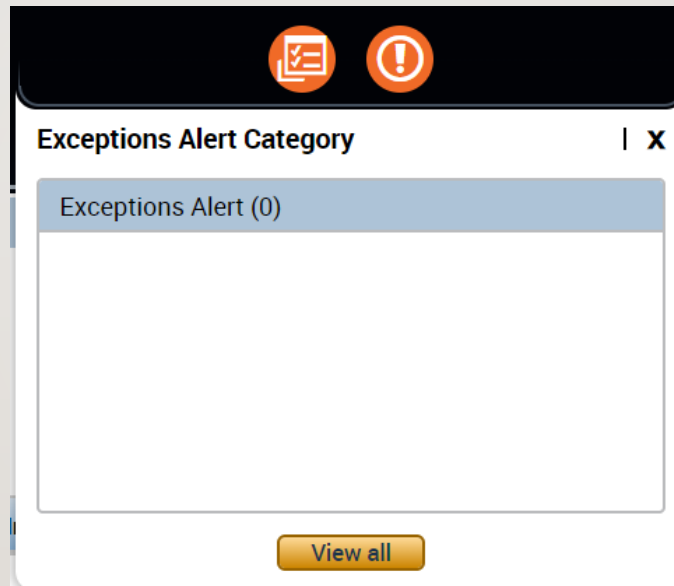




# TIME OFF – REVIEWING TIME OFF REQUESTS

1 2 3

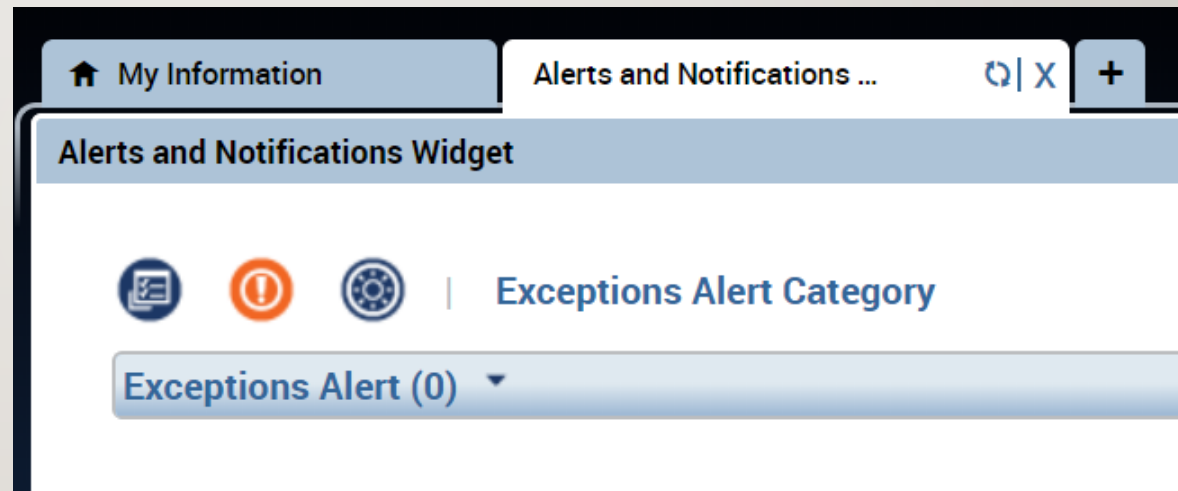
1. At the top of your screen you will have the notification center
2. The exceptions bubble will show you the most recent exception notifications
3. The request manager alert category will show you the most recent request updates



# TIME OFF – REVIEWING TIME OFF REQUESTS

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- I. After clicking **View All** on the notifications center, you will be taken to a list of every exception and every request manager alert

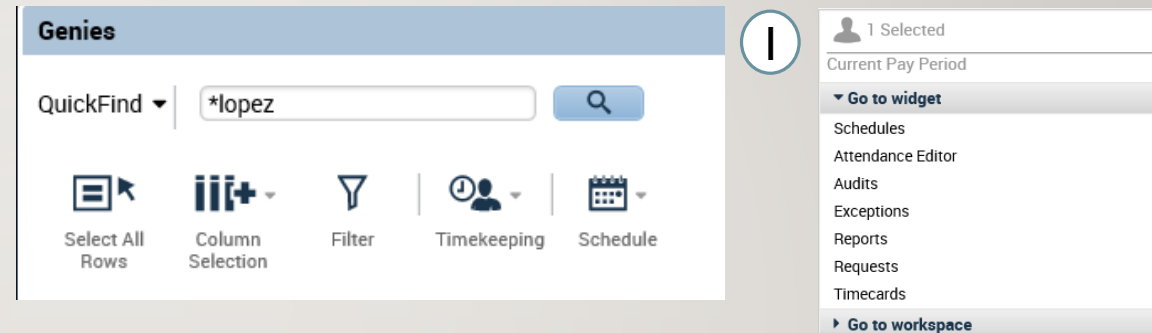


# TIME OFF — EXERCISE 10

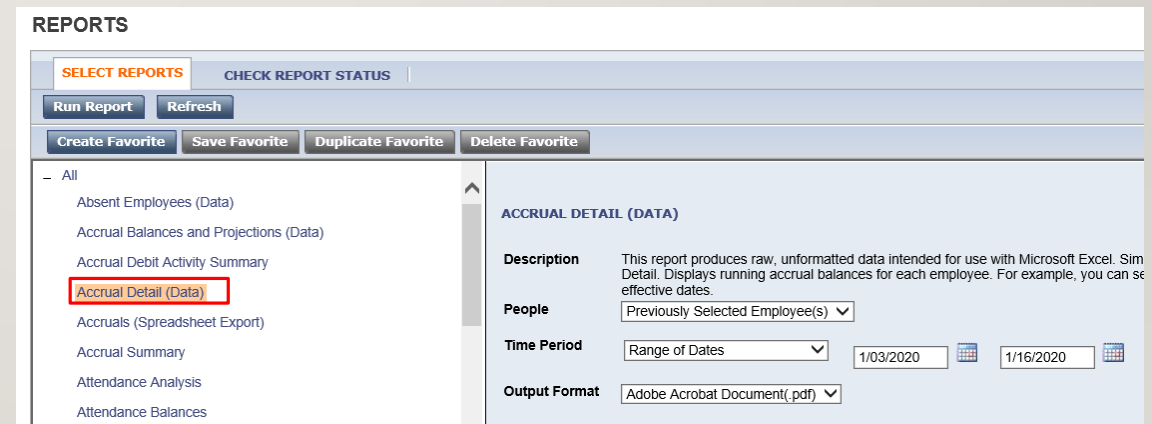
PLEASE REFER TO THE HR  
EXERCISE GUIDE IN  
ORDER TO PRACTICE  
THE PREVIOUS  
CONCEPT

# TIME OFF – TIME OFF REPORT

1. Use the QuickFind to find the employee you want to make changes for. Use the Go To button to access **Reports**
2. Through the reports interface select the Accrual Detail report and select **Run Report**
3. Can be run the same way for any of the listed reports



The screenshot shows the 'Genies' interface. At the top, there is a 'QuickFind' search bar containing the text '\*lopez'. Below the search bar are several icons: 'Select All Rows', 'Column Selection', 'Filter', 'Timekeeping', and 'Schedule'. On the right side, there is a 'Go To widget' menu that is currently open, showing a list of options: Schedules, Attendance Editor, Audits, Exceptions, Reports, Requests, and Timecards. The 'Reports' option is highlighted. Above the menu, it says '1 Selected' and 'Current Pay Period'. A circled '1' is placed over the 'Go To widget' button.



The screenshot shows the 'REPORTS' interface. At the top, there are two tabs: 'SELECT REPORTS' (active) and 'CHECK REPORT STATUS'. Below the tabs are several buttons: 'Run Report', 'Refresh', 'Create Favorite', 'Save Favorite', 'Duplicate Favorite', and 'Delete Favorite'. On the left side, there is a list of reports, with 'Accrual Detail (Data)' highlighted in a red box. On the right side, there is a form for the 'ACCRUAL DETAIL (DATA)' report. The form includes a 'Description' field, a 'People' dropdown menu set to 'Previously Selected Employee(s)', a 'Time Period' section with a 'Range of Dates' dropdown and two date pickers (1/03/2020 and 1/16/2020), and an 'Output Format' dropdown set to 'Adobe Acrobat Document(.pdf)'. A circled '2' is placed over the 'Run Report' button.

# TIME OFF – TIME OFF REPORT

1. Switch to the Check Report Status tab and select the Accrual Detail report. Select the appropriate report and press View Report.
2. The report will download and show you all your accrual information

**REPORTS**

SELECT REPORTS | CHECK REPORT STATUS

View Report Refresh Status Delete

Name  Search

Report Name	Format
Accruals (Spreadsheet Export)	xlsx
Accrual Detail (Data)	pdf
Accrual Detail (Data)	pdf
Accrual Debit Activity Summary	pdf

**Accruals (Spreadsheet Export)** Executed On: 1/09/2020 9:55AM  
 Data Up to Date: 1/09/2020 9:55AM Printed For: 006  
 Time Period: 1/03/2020 - 1/16/2020 Untotalized Employee Count: 0

Employee	Reporting Period		Accrual Code		
Name	Start Date	End Date	Name	Unit	Opening Balance
Persona, Employee	1/01/2020	12/31/2020	Bone Marrow Donor	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Comp Time	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Comp Time Expired	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Comp Time Holiday	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Comp Time Holiday Expired	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	LV-CTFMLA	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	LV-CTFMLAMIL	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	LV-FMLA	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	LV-FMLAMIL	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	LV-Tracking	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Military Leave Active Duty	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Military Leave Training	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Olympics	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Organ Donor	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Personal	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Red Cross	Hour	0.0

1

2



# TIME OFF — EXERCISE II

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ORDER TO PRACTICE  
THE PREVIOUS  
CONCEPT

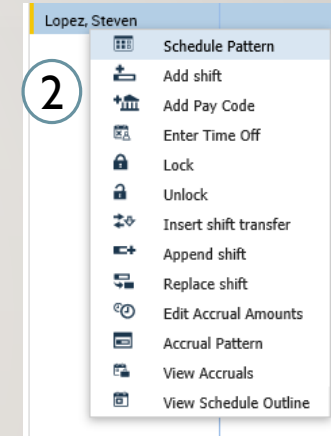
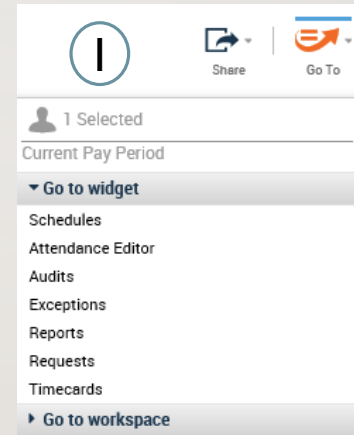
# SCHEDULING

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# SCHEDULING – ADDING A SCHEDULE

1. After selecting an employee using the QuickFind, press the Go To button and select **Schedules**
2. Right click the name of the employee or one of the empty cells on the schedule and select **Add shift**. You can also left click on one of the cells and manually enter in a timeframe.
3. On the add shift window enter the type of shift, the date, the start time, and the end time. Select Apply to save your changes and add the shift to the schedule.

A screenshot of the 'Add Shift' form. It includes fields for 'Assigned to' (Lopez, Steven), 'Shift Details' (12:00am-1:00am(1.00h)), and 'Primary Job' (None). There is also a 'Repeat this shift for' field set to 1 day. A table below contains a single row of shift data. A circled '3' is placed over the top-right corner of the form.

	Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
+ x	1/04/2020	Regular	12:00am	1:00am	1/04/2020	1.00			

# SCHEDULING – EDITING A SCHEDULE

1. Open the Quick Actions icon to pop out all the different things that you can do for a persons schedule. Press Copy/Paste and then select the schedule you want to copy by clicking on it and then click every cell you want to paste it to
2. After selecting a cell you can also select a pay code for that particular day and add it through the schedule. Using the pay code button and the drop down you can select the desired pay code and add it for just that day or include it in a pattern

The screenshot displays a scheduling software interface. At the top, a horizontal toolbar contains various icons for actions: Assign, Unassign, Shift Transfer, Insert shift template, Comment, Pay Code, Copy / Paste, Delete, Lock / Unlock, Swap, and Quick Actions. A blue circle with the number '1' is positioned to the right of the 'Quick Actions' icon. Below the toolbar, a 'Copy / Paste' dropdown menu is open, showing a search bar and a list of pay codes. A blue circle with the number '2' is positioned to the right of this dropdown. The background shows a schedule grid for an employee named Lopez, Steven, with a shift from 8:00AM to 4:00PM on Friday, 1/03.

By Employee		12/29 - 1/04	
Name ^	Fri 1/03	Sat 1/04	
Lopez, Steven	8:00AM - 4:00PM		

Search...  
Administrative Leave Paid  
Agency-Union Picnic or Party  
Agency Weather-Emer Closing  
Call Back Payment Hours  
Career Mobility  
CCE - Comp Time Earned  
Displayed 100 of 124. Please narrow down your search.



# SCHEDULING – EDITING A SCHEDULE

1. You can add multiple rows for different occurrences
2. Perform a labor level transfer as previously done (slide 24) for working a different position or for working at a different location or perform a work rule transfer as previously shown (slide 25) for situations where your hours need to be paid out differently than they typically are due to bargaining unit rules.

### Edit Shift

Assigned to:  Shift Details: 10:00am-10:00am(0.00h) Primary Job: None

Insert Template  Shift Label:  Repeat this shift for  days

	Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
<input type="checkbox"/>	1/03/2020	Regular	10:00am	4:00pm	1/03/2020	6.00			
<input type="checkbox"/>	1/03/2020	Regular	8:00am	10:00am	1/03/2020	2.00			

Comments (0) [Add Comment](#)



# SCHEDULING – EDITING A SCHEDULE – OFF TIME

1. Time that is not scheduled and needs to have a work rule transfer must use Off Time
2. For employees to be paid correctly, all time and work rules should be entered and scheduled before hand. If the employee is going to be using a work rule or labor account transfer such as when they get On Call, you would need to use Off Time.

1

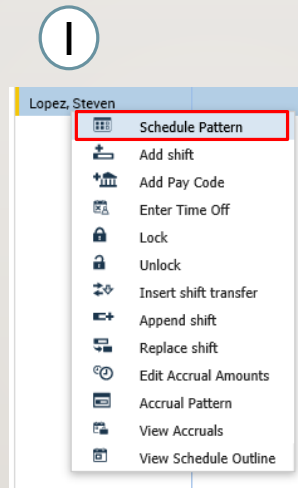
Start Date	Type	Start Time	End Time	End Date	Duration
7/01/2020	Off	4:00am	7:00am	7/01/2020	3:00

2

Time Slot
4:00AM - 7:00AM (o)
7:00AM - 3:00PM
3:00PM - 11:00PM

# SCHEDULING – ADDING A SCHEDULE PATTERN

1. If instead of selecting insert a shift you select **Schedule Pattern**, you can create a schedule for an employee for these desired period of time and choose how often it would repeat. Start your pattern on a Friday since pay periods start on Fridays.
2. Fill in the anchor date which is the day the pattern begins and should be on a Friday due to the pay period. Then select the start date and the end date or check in the bubble for making the pattern repeat forever. After that you have the option to define the pattern for multiple weeks or for a certain amount of days and then you would fill in the desired schedules.



A screenshot of the 'Schedule Pattern' configuration form. The form is titled 'Schedule Pattern' and shows it is assigned to 'Lopez, Steven' with a primary job of 'None'. A circled '2' is placed above the form. The form includes fields for 'Start Date', 'End Date', 'Duration', and 'Rotation'. Below these are 'Add Pattern' options: 'Anchor Date' (1/03/2020), 'Start Date' (1/03/2020), and 'End Date' (empty). There is a 'Forever' radio button selected. The 'Define Pattern for' section has '1' selected for 'Week(s)'. There are buttons for 'Add Shift', 'Add Pay Code', 'Shift Template', and 'Pattern Template'. A table shows the schedule for two items, with Item 1 having a pattern of 1 on Friday and Item 2 having a pattern of 1 on Saturday. The table has columns for 'No.', 'Sunday', 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', and 'Saturday'. There are 'Cancel' and 'Apply' buttons at the bottom right.

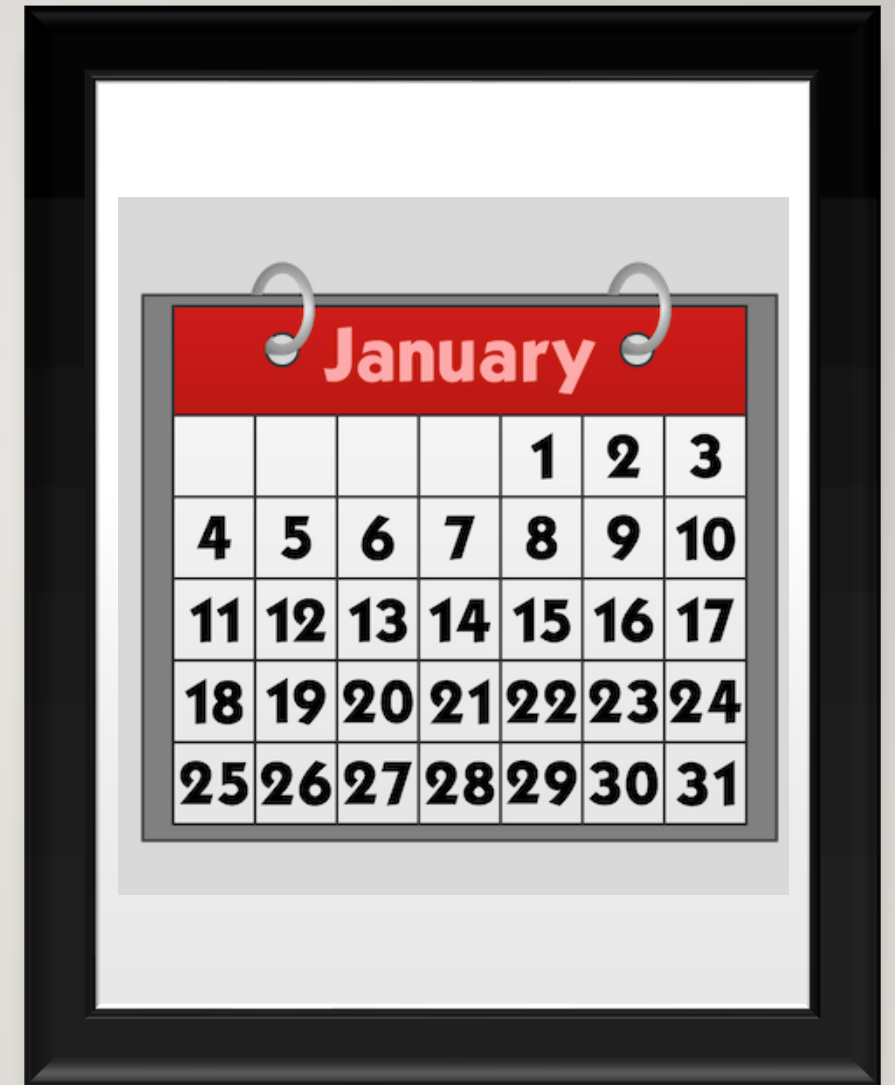
No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1						1	
2							1

# SCHEDULES — EXERCISE 12

PLEASE REFER TO THE HR  
EXERCISE GUIDE IN  
ORDER TO PRACTICE  
THE PREVIOUS  
CONCEPT

# LEAVE

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# LEAVE – VIEWING LEAVE CASES

1. In order to view leave cases, click the ‘ + ’ symbol and open Leave Administration, all cases will appear here depending on the filters chosen
2. Using the Show drop down you can filter out what type of cases are shown as shown on the right, you can also use the Time Period drop down to select what time period or range of dates you want to view the requests in and narrow down your search

Name	Leave Case Status	Leave Category	Leave Reason	Leave Case Code	Leave Frequency	Leave Case Approval Status	Initial Leave Request Date	Leave Start Date	Documents Overdue	New Leave Requests	Leave End Date
Anderson, Marcia R	Submitted	Personal	Other	POTHER	Intermittent	Pending	1/06/2020	1/10/2020			1/10/2020
Leave, Test 1	Open	Personal Medical Leave	Pregnancy Disability Leave	SFLMAT	Intermittent	Pending	12/12/2019	12/12/2019			
Leave, Test 1	Open	Personal Medical Leave	Illness Injury	SLFILL	Intermittent	Pending	11/15/2019	11/18/2019	▼		
Leave, Test 2	Open	Personal Medical Leave	Illness Injury	SLFILL	Continuous	Approved	8/01/2018	8/01/2018	▼		

ave Cases ▼

- All Home
- LV-Closed Cases
- LV-Continuous Cases
- LV-Intermittent Cases
- LV-Open and Closed Cases
- LV-Open Cases**
- LV-Punchd in during Cont Leave

Show

Time Period Current Pay Period ▼

2

Show LV-Open Cases ▼

Time Period

- Previous Pay Period
- Current Pay Period**
- Next Pay Period

Refresh

- Previous Schedule Period
- Current Schedule Period
- Next Schedule Period
- After Next Schedule Period

Name 1 /

- Anderson, Marcia R
- Leave, Test 1

- Today
- Yesterday
- Week to Date
- Last Week
- Specific Date
- Range of Dates



# LEAVE – LEAVE CASE ACTIONS

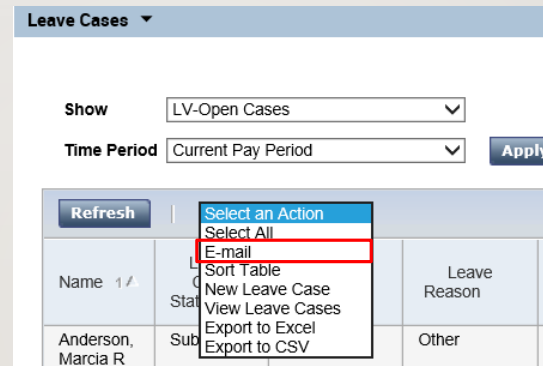
1. Through the Leave Cases interface you can select a particular leave case and through the **Select an Action** drop down you can select what you would like to do
2. Select All, will select all leave cases, and allow you to perform further action on all the leave cases shown by the filters you've selected

The screenshot shows the 'Leave Cases' interface. At the top, there is a header 'Leave Cases' with a dropdown arrow. Below this, there are two filter dropdowns: 'Show' set to 'LV-Open Cases' and 'Time Period' set to 'Current Pay Period'. An 'Apply' button is to the right of the 'Time Period' dropdown. Below the filters is a table with a 'Refresh' button on the left. A dropdown menu titled 'Select an Action' is open over the table, listing the following options: 'Select All', 'E-mail', 'Sort Table', 'New Leave Case', 'View Leave Cases', 'Export to Excel', and 'Export to CSV'. The table has columns for 'Name', 'Leave Status', and 'Leave Reason'. The first row shows 'Anderson, Marcia R' with 'Sub' under 'Leave Status' and 'Other' under 'Leave Reason'.

Name	Leave Status	Leave Reason
Anderson, Marcia R	Sub	Other

# LEAVE – LEAVE CASE ACTIONS: E-MAIL

E-mail will allow you to send an email to an employee whether you want to remind them of a deadline for document submission or update them on the status of the leave case



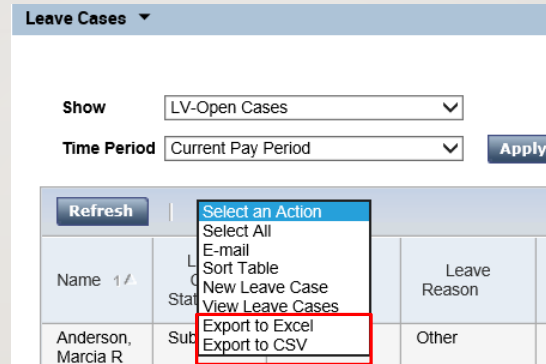
# LEAVE – LEAVE CASE ACTIONS: SORT TABLE

- I. In order to organize the table, the Sort action will list cases by the default name, the easiest way to do this is by clicking the column you want to sort by. You can choose a column as a primary and secondary sort, then you can determine whether you want the organize it in ascending or descending order by changing the direction of the triangle on the column, also by clicking.

Refresh   Select an Action ▼								
Name 1 ▲	Leave Case Status 2 ▲	Leave Category	Leave Reason	Leave Case Code	Leave Frequency	Leave Case Approval Status	Initial Leave Request Date	Leave Start Date
Anderson, Marcia R	Submitted	Personal	Other	POTHER	Intermittent	Pending	1/06/2020	1/10/2020
Leave, Test 1	Open	Personal Medical Leave	Pregnancy Disability Leave	SFLMAT	Intermittent	Pending	12/12/2019	12/12/2019
Leave, Test 1	Open	Personal Medical Leave	Illness Injury	SLFILL	Intermittent	Pending	11/15/2019	11/18/2019
Leave, Test 2	Open	Personal Medical Leave	Illness Injury	SLFILL	Continuous	Approved	8/01/2018	8/01/2018

# LEAVE – LEAVE CASE ACTIONS: EXPORT

- I. By using the Export action under Select an Action, you can choose to view all the leave cases and all their information in excel format. The only cases that will be exported are those you've filtered in using the Show and Time Period drop downs

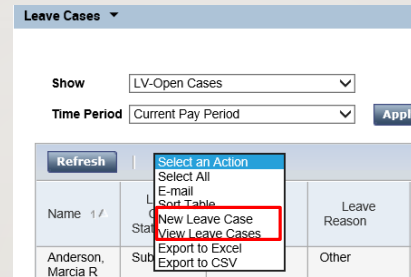


	A	B	C	D	E	F	G	H	I	J	K	L
	Name	Leave Case Status	Leave Category	Leave Reason	Leave Case Code	Leave Frequency	Leave Case Approval Status	Initial Leave Request Date	Leave Start Date	Documents Overdue	New Leave Requests	Leave End Date
1												
2		Submitted	Personal	Other	POTHER	Intermittent	Pending	1/6/2020	1/10/2020			1/10/2020
3	Leave, Test 1	Open	Personal Medical L	Pregnancy Disab	SFLMAT	Intermittent	Pending	12/12/2019	12/12/2019			
4	Leave, Test 1	Open	Personal Medical L	Illness Injury	SLFILL	Intermittent	Pending	11/15/2019	11/18/2019	X		
5	Leave, Test 2	Open	Personal Medical L	Illness Injury	SLFILL	Continuous	Approved	8/1/2018	8/1/2018	X		
6	Persona, Employee	Open	Caregiver Leave	Child	FCHILD	Continuous	Approved	1/8/2020	2/1/2020			
7	Persona, Employee	Submitted	Personal Medical L	Organ Donor	Organ	Continuous	Pending	1/9/2020	1/27/2020			3/1/2020
8	Persona, Employee	Retracted	Personal Medical L	Illness Injury	SLFILL	Continuous	Pending	11/18/2019	11/18/2019			12/30/2020
9	Persona, Employee	Submitted	Personal Medical L	Illness Injury	SLFILL	Continuous	Pending	12/12/2019	12/16/2019			
10	Unit Test, Leave	Open	Bonding Leave	Baby Bonding	FBABYB	Continuous	Pending	1/8/2020	3/27/2020			4/27/2020
11	Unit Test, Leave	Open	Personal Medical L	Maternity	MAT	Continuous	Pending	1/8/2020	1/8/2020			3/26/2020
12	Unit Test, Leave	Open	Personal	Volunteer Firefig	Volunt	Continuous	Pending	12/12/2019	12/12/2019			
13	Unit Test, Leave	Open	Personal Medical L	Illness Injury	SLFILL	Continuous	Approved	1/8/2020	12/2/2019			1/2/2020
14	Unit Test, Leave	Open	Personal Medical L	Illness Injury	SLFILL	Intermittent	Pending	1/8/2020	1/1/2020			12/31/2020



# LEAVE – LEAVE CASE ACTIONS:VIEW LEAVE CASES

1. After selecting the View Leave Cases menu item on the Actions drop down you will be prompted to the leave cases interface
2. From this list of leave cases you can use the menu to **Create**, **Edit**, or **Delete** the leave case



A screenshot of the full 'Leave Cases' interface. The title is 'LEAVE CASES' and it is for 'Person & Id Leave, Test 1 (000001)'. The interface includes 'Return', 'Refresh', 'New', 'Edit', and 'Delete' buttons, along with a 'Select an Action' dropdown. The 'Time Period' is set to 'Current Pay Period' for '1/03/2020 – 1/16/2020'. Below is a table with the following data:

	Leave Case Status	Leave Category	Leave Reason	Leave Case Code	Current Leave Frequency	Leave Case Approval Status	Leave Start Date	Documents Overdue	New Leave Requests	Leave End Date	Total Paid Leave Takings	Total Unpaid Leave Takings
<input type="checkbox"/>	Open	Personal Medical Leave	Illness Injury	SLFILL	Intermittent	Pending	11/18/2019	Yes		<None>	0.0	0.0
<input checked="" type="checkbox"/>	Open	Personal Medical Leave	Pregnancy Disability Leave	SFLMAT	Intermittent	Pending	12/12/2019			<None>	1.0	2.0



# LEAVE – LEAVE CASE ACTIONS: EDITING/CREATING A CASE SUMMARY

1. The first step in creating a new leave case or editing an existing one is filling in the case summary, here you fill in the time frame, category status, leave code, and effective date. Mandatory fields are marked with an asterisk with optional fields like details and temporary mailing address there if necessary.
2. Only Case Summary, Additional Information, Eligibility & Leave Types, Leave Rules, and Takings List are required, the rest are all prepopulated or optional.

The screenshot displays the 'LEAVE CASE EDITOR' interface. At the top, it shows 'Person & Id' as 'Leave, Test 1 (000001)' and 'Leave Case' as 'SFLMAT 12/12/2019 - <None>'. Below this is a navigation bar with tabs: 'GENERAL' (selected), 'LEAVE REQUESTS', 'LEAVE CALENDAR', 'TAKINGS LIST', and 'AUDITS'. A left sidebar lists various sections: 'Case Summary', 'Additional Information', 'Eligibility & Leave Types', 'Documents', 'Document Status', 'Frequency & Duration', 'Notifications', 'Employment Status', and 'Leave Rules'. The main 'CASE SUMMARY' section contains a table for leave types and several form fields. The table shows 'Total Committed Takings' with 'Paid Leave' at 1.0 and 'Unpaid Leave' at 2.0. Mandatory fields (marked with an asterisk) include 'Leave Start Date' (12/12/2019), 'Initial Leave Request Date' (12/12/2019), 'Leave End Date', 'Case Status' (Open), 'Leave Category' (Personal Medical Leave), 'Reason' (Pregnancy Disability Leave), 'Leave Frequency' (Intermittent), 'Effective Date' (12/12/2019), and 'Leave Case Code' (SFLMAT). Other fields include 'Case Approval Status' (Pending) and 'Effective Date' (12/12/2019). There are also sections for 'Temporary Mailing Address' and 'Details'.

	Paid Leave	Unpaid Leave
Total Committed Takings	1.0	2.0

\* Leave Start Date: 12/12/2019  
\* Initial Leave Request Date: 12/12/2019  
Leave End Date: [ ]  
Requested Daily Leave Hours: Same each day/Variable (Same hours each day)

Case Status: Open  
Effective Date: 12/12/2019  
\* Leave Category: Personal Medical Leave  
Reason: Pregnancy Disability Leave  
Leave Frequency: Intermittent  
\* Effective Date: 12/12/2019  
\* Leave Case Code: SFLMAT  
Case Approval Status: Pending  
Effective Date: 12/12/2019  
Temporary Mailing Address: [ ]  
Details: [ ]

# LEAVE – LEAVE CASE ACTIONS: EDITING/CREATING A CASE ADDITIONAL INFORMATION

The additional information tab is optional and can be filled in to provide clarity on certain leave cases

→ Case Summary  
→ **Additional Information**  
→ Eligibility & Leave Types  
→ Documents  
→ Document Status  
→ Frequency & Duration  
→ Notifications  
→ Employment Status  
→ Leave Rules

**ADDITIONAL INFORMATION**

**General Notes**

**Eligibility Notes**

**Doctor Name**

**Disability Claim Number**

**Save & Next** →

# LEAVE – LEAVE CASE ACTIONS: EDITING/CREATING A CASE ELIGIBILITY AND LEAVE TYPES

1. Eligibility & Leave Types gives you information on which paid and unpaid leave types the employee is eligible for. Using the Leave Balances as of date and clicking Check Eligibility will give you a list of all the potential leave types.
2. Bypass eligibility check will allow you to create a leave case using a type the employee may not be eligible for: This will be a requirement for creating a leave case in the first year
3. Grant leave will not be used

**ELIGIBILITY & LEAVE TYPES**

Leave Start Date 7/10/2020  
 Leave End Date <None> Initial Leave Request Date 7/10/2020

Eligibility Requirements have been bypassed.

\* Leave Balances as of 8/13/2020

Use in this Leave Case	Paid Leave Type	Committed Hours	Available Balance
<input checked="" type="checkbox"/>	LV-Comp Used Combo	0.0	0.0
<input checked="" type="checkbox"/>	LV-Comp Used Federal	0.0	0.0
<input checked="" type="checkbox"/>	LV-Comp Used SEBAC	0.0	0.0
<input checked="" type="checkbox"/>	LV-Comp Used State	0.0	0.0
<input checked="" type="checkbox"/>	LV-Holiday Combo	0.0	999.0
<input checked="" type="checkbox"/>	LV-Holiday Comp Combo	0.0	0.0
<input checked="" type="checkbox"/>	LV-Holiday Comp Federal	0.0	0.0
<input checked="" type="checkbox"/>	LV-Holiday Comp SEBAC	0.0	0.0
<input checked="" type="checkbox"/>	LV-Holiday Comp State	0.0	0.0
<input checked="" type="checkbox"/>	LV-Holiday Federal	0.0	999.0
<input checked="" type="checkbox"/>	LV-Holiday SEBAC	0.0	999.0
<input checked="" type="checkbox"/>	LV-Holiday State	0.0	999.0
<input checked="" type="checkbox"/>	LV-Personal Combo	0.0	24.0

Use in this Leave Case	Unpaid Leave Type	Committed Hours	Available Balance
<input checked="" type="checkbox"/>	CTFMLA Self	0.0	640.0
<input checked="" type="checkbox"/>	FMLA Federal Self	0.0	480.0
<input checked="" type="checkbox"/>	SEBAC	0.0	0.0

# LEAVE – LEAVE CASE ACTIONS: EDITING/CREATING A CASE ELIGIBILITY AND LEAVE TYPES

When creating a leave case in Kronos you can use the table pictured on the right as reference. It shows the Kronos equivalent to the TRC codes you are familiar with and will assist with the eligibility check

Table: Kronos Pay Code to TRC to earn code mapping table

Kronos				
Kronos Category	Kronos Reason	NEW KRONOS PAY CODE	Core-CT TRC	Core-CT Description
Caregiver Leave	Partner	LV-Unpaid SEBAC	Caregiver	Unpaid SEBAC Sup Spouse
Caregiver Leave	Partner	LV-Unpaid State	Caregiver	Unpaid State Caregiver Spouse
Caregiver Leave	Partner	LV-Vacation Combo	Caregiver	Vac Combo Caregiver Spouse
Caregiver Leave	Partner	LV-Vacation Federal	Caregiver	Vac Federal Caregiver Spouse
Caregiver Leave	Partner	LV-Vacation SEBAC	Caregiver	Vacation SEBAC Sup Care Spouse
Caregiver Leave	Partner	LV-Vacation State	Caregiver	Vac State Caregiver Spouse
Caregiver Leave	Child	LV-Comp Used Combo	CCCC	Comp Combo Caregiver Child
Caregiver Leave	Parent	LV-Comp Used Combo	CCCP	Comp Combo Caregiver Parent
Caregiver Leave	Parent In Law	LV-Comp Used Combo	CCCP	Comp Combo Caregiver Parent
Caregiver Leave	Child	LV-Comp Used Federal	CFCC	Comp Federal Caregiver Child
Caregiver Leave	Parent	LV-Comp Used Federal	CFCP	Comp Federal Caregiver Parent
Caregiver Leave	Parent In Law	LV-Comp Used Federal	CFCP	Comp Federal Caregiver Parent
Caregiver Leave	Child	LV-Comp Used SEBAC	CSBCC	Comp SEBAC Sup Care Child
Caregiver Leave	Parent	LV-Comp Used SEBAC	CSBCP	Comp SEBAC Sup Care Parent
Caregiver Leave	Parent In Law	LV-Comp Used SEBAC	CSBCP	Comp SEBAC Sup Care Parent



# LEAVE – LEAVE CASE ACTIONS: EDITING/CREATING A CASE LEAVE RULES

Using the Leave Rules section select the appropriate Leave Rule and the Effective Date. Click Save when completed

Select the appropriate leave type based on the paid and unpaid leave codes displayed next to it

**LEAVE RULES**

**Leave Start Date** 12/12/2019      **Leave Frequency** Intermittent as of 12/12/2019  
**Leave End Date** <None>      **Initial Leave Request Date** 12/12/2019

		Leave Rule	* Effective Date
<input type="radio"/>		Pregnancy Disability Leave Biological Mother	12/12/2019

**Save**

Paid Leave Types	Unpaid Leave Types
LV-Sick, LV-Unpaid	CTFMLA Self, FMLA Federal Self, Non-CTFMLA, Non-FMLA Self, Non-SEBAC, SEBAC



# LEAVE – LEAVE CASE ACTIONS: EDITING/CREATING A CASE TAKINGS LISTS

1. After accessing the Takings List you can use the Actions drop down to select what you want to do. Here you would need to Add Projections over a period of time. You also have the option to commit these changes if you're okay with the projection or delete the projection and change the original settings

2. If you select Add projected leave time over long range you will select the data range and then add any additional settings such as excluding weekends and exhausting leaves, then you will enter Hours per day and then Save & Return

The screenshot displays the 'LEAVE CASE EDITOR' interface. The 'TAKINGS LIST' tab is active, showing a table with columns for Day, Date, Leave Time Amount, LV-Comp, and LV-Holiday Comp. A dropdown menu is open over the table, listing actions such as 'Add Projected Leave Time Over Long Range...', 'Recalculate Projected Takings', and 'Commit to Schedule/Timecard...'. A red circle with the number '1' is placed above the dropdown menu.

To the right, the 'ADD PROJECTED LEAVE TIME OVER LONG RANGE' dialog is shown. It includes fields for 'Start Date' and 'End Date', both set to 1/10/2020. There are checkboxes for 'Exhaust all paid and unpaid leave allowed', 'Leave takings on scheduled days only', and 'Exclude Saturdays and Sundays'. The 'Takings Type' is set to 'Both paid and unpaid takings', and 'Hours per Day' is set to 8:00. A red circle with the number '2' is placed to the right of the dialog.

# LEAVE – LEAVE CASE ACTIONS: EDITING/CREATING A CASE TAKINGS LISTS

1. The projection will look like the image on the right, if the projection is correct you can Commit to schedule and timecard. Otherwise you can Delete Projected Leave Time, recalculate, or override individual leave time/takings

<input type="checkbox"/>	Sat	2/01/2020	8.0				8.0		8.0	8.0				
<input type="checkbox"/>	Sun	2/02/2020	8.0				8.0		8.0	8.0				
<input type="checkbox"/>	Mon	2/03/2020	8.0				8.0		8.0	8.0				
<input type="checkbox"/>	Tue	2/04/2020	8.0			7.0	1.0		8.0	8.0				
<input type="checkbox"/>	Wed	2/05/2020	8.0			8.0			8.0	8.0				
<input type="checkbox"/>	Thu	2/06/2020	8.0			8.0			8.0	8.0				
<input type="checkbox"/>	Fri	2/07/2020	8.0			1.0			8.0	8.0				
<input type="checkbox"/>	Sat	2/08/2020	8.0						8.0	8.0				
<input type="checkbox"/>	Sun	2/09/2020	8.0						8.0	8.0				
<input type="checkbox"/>	Mon	2/10/2020	8.0						8.0	8.0				
Committed				0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Projected				0.0	0.0	24.0	201.0	0.0	256.0	256.0	0.0	0.0	0.0	0.0
Total				0.0	0.0	24.0	201.0	0.0	256.0	256.0	0.0	0.0	0.0	0.0
Committed Leave Time			0.0											
Projected Leave Time			256.0											

**TAKINGS LIST**

Select an Action

- Add Projected Leave Time Over Long Range...
- Recalculate Projected Takings
- Complete Projected Takings...
- Override Projected Leave Time/Takings...
- Commit to Schedule/Timecard...
- Undo Commit...
- Delete Projected Leave Time...
- View Day Detail

2. If the projected time is in the past commit to timecard, if in the future commit to schedule, you also have the option to commit both at once

**COMMIT TO SCHEDULE/TIMECARD** Person & Id Leave, Test 1 (000001)

Leave Case SLFILL 11/18/2019 - <None>

\* Commit End Date

Takings Type

Destination

Transfer

# LEAVE – LEAVE CASE ACTIONS: OVERRIDING PROJECTED LEAVE TIME

If your projected leave time does not properly apply or needs to be adjusted to more specific values select all days you want to modify. Then undo the commit if committed, and select override projected leave time. Here you will be able to make modifications on a day by day basis

Always commit the leave takings after editing them or creating them


	GENERAL	LEAVE REQUESTS	LEAVE CALENDAR	TAKINGS LIST	AUDITS
Save Save & Return Return Refresh Select an Action					
Time Period Previous Year 1/01/2019 – 12/31/2019 Apply					
<input checked="" type="checkbox"/>	Day	Date	Leave Time Amou		
<input checked="" type="checkbox"/>	Fri	11/08/2019	8:00		
<input checked="" type="checkbox"/>	Sat	11/09/2019	8:00		
<input checked="" type="checkbox"/>	Sun	11/10/2019	8:00		

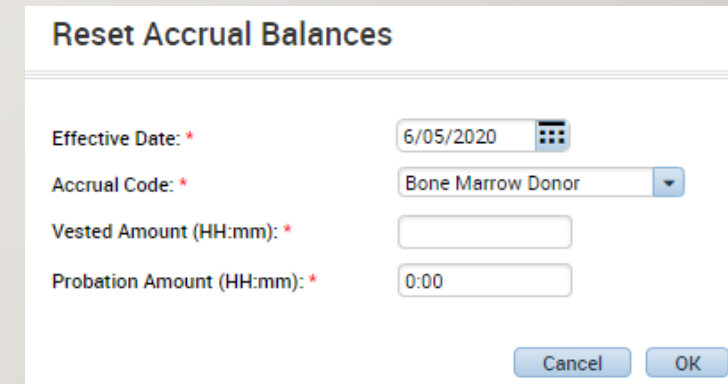
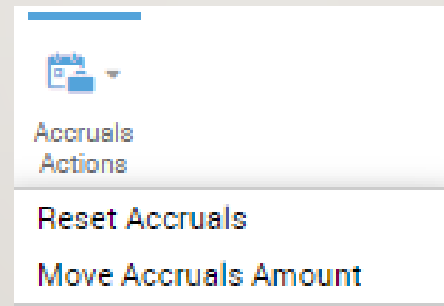
DAR	TAKINGS LIST	AUDITS
Select an Action		
Select an Action		
Add Projected Leave Time Over Long Range...		
Recalculate Projected Takings		
Complete Projected Takings...		
Override Projected Leave Time/Takings...		
Commit to Schedule/Timecard...		
Undo Commit...		
Delete Projected Leave Time...		
View Day Detail		

	Paid Leave
	LV-Sick
8:00	8:00
8:00	8:00
8:00	8:00

# LEAVE – LEAVE CASE ACTIONS: RESETTING ACCRUALS

- When performing a leave case override, if you receive the following notification it may mean your accruals are out of sync with Core CT
- Validate your accruals in Core and if they are not in sync you will need to reset your accruals to match those in Core CT as shown

 This edit cannot be made. Sick Leave Bank balance on 6/07/2020 is -8:00 (overdrawn by 8:00). Maximum overdraw is 0:00. LV-CTFMLA balance on 6/07/2020 is -8:00 (overdrawn by 8:00). Maximum overdraw is 0:00. LV-FMLA balance on 6/07/2020 is -8:00 (overdrawn by 8:00). Maximum overdraw is 0:00.



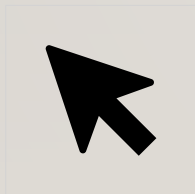
A screenshot of a "Reset Accrual Balances" dialog box. It contains the following fields and controls:

- Effective Date: \* 6/05/2020 (with a calendar icon)
- Accrual Code: \* Bone Marrow Donor (with a dropdown arrow)
- Vested Amount (HH:mm): \* (empty text box)
- Probation Amount (HH:mm): \* 0:00 (text box)
- Buttons: Cancel and OK



# LEAVE – LEAVE CASE ACTIONS: INTERMITTENT LEAVE CASE

1. In order to create an intermittent leave case follow the same previous steps but select the Intermittent leave frequency
2. Once created, navigate to the employee's timecard and select quick leave editor, here you can input any future takings on a daily basis
3. Once edited, navigate to leave case editor and validate the leave distribution, if incorrect perform an override as shown on the slide below (click/slide 29)



Reason

Leave Frequency

\* Leave Case Code

Refresh Calculate Totals Save Go To

1 Selected

Current Pay Period

Go to widget

- Reports
- Requests
- Rule Analysis
- Attendance Editor
- Leave Case Editor
- Leave Case List
- Quick Leave Editor

Go to workspace



# LEAVE – THINGS TO CONSIDER

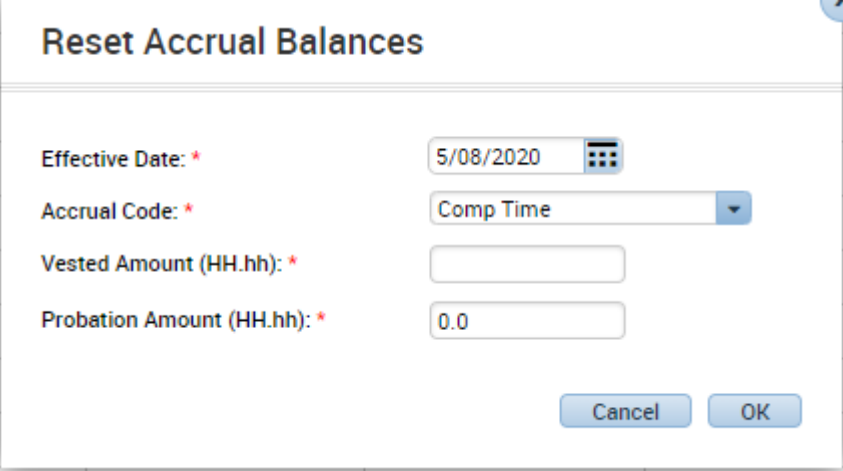
---

## Things to consider in order to keep Kronos and Core CT in sync

-Keeping comp plans balances in sync through accrual resets and updates

-When adding a new employee in Core CT, add the employee, wait a day and then validate their information in Kronos

-For Transfers may need to update the accrual balances to remain in sync with Core CT



The screenshot shows a dialog box titled "Reset Accrual Balances". It contains the following fields and controls:

- Effective Date: \***: A date input field with the value "5/08/2020" and a calendar icon to its right.
- Accrual Code: \***: A dropdown menu with "Comp Time" selected.
- Vested Amount (HH.hh): \***: An empty text input field.
- Probation Amount (HH.hh): \***: A text input field containing the value "0.0".

At the bottom right of the dialog, there are two buttons: "Cancel" and "OK".

# DEMO

---

Now we will cover a demo of inputting a sick family leave case into Kronos, example shown in Leave Manager Exercise guide

# LEAVE - EXERCISE 13

PLEASE REFER TO THE HR  
EXERCISE GUIDE IN  
ORDER TO PRACTICE  
THE PREVIOUS  
CONCEPT

# THE END

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Please refer to the Timekeeper Job Aids and the eLearnings for any further questions and don't hesitate to reach out to your local Kronos contact and your supervisors with any questions